



Mayor's Task Force on the Future of the Strand Theatre: Benchmarking and Competitive Landscape Research Findings

July 2004



Technical Development Corporation
31 Milk St. Suite 310 Boston, MA 02109



Agenda

- Executive Summary
- Benchmark Theatres
- Competitive Landscape Research
 - Local Arts and Cultural Groups
 - Boston Theatres



Executive Summary



Executive Summary

TDC's Research Agenda

- The Strand Theatre Task Force engaged TDC to:
 - Provide benchmarking and competitive landscape research that would inform the Task Force's creation of recommendations for the Strand Theatre's future programming and operations.
- To this end, TDC designed a research process that would:
 - Look for other models nationally in a similar market position and seating capacity to the Strand Theatre;
 - Conduct interviews with local arts and cultural groups to examine the demand for theatre spaces and to learn about perceptions of the opportunities and challenges of the Strand Theatre; and
 - Review existing and planned theatres in Boston to better understand the supply of theatre spaces.



Executive Summary

Key Findings and Implications

- TDC's research indicates that capital improvements, changes in management, and key relationships with local arts groups and presenters are needed in order for the Strand Theatre to thrive in the future.
- While the Strand has “good will” among Boston's arts groups, interviews with such groups revealed that capital investments will need to be made in order for it to be amenable to performers and audiences.
 - In addition to capital improvements to the building, the Strand will also need to tackle issues of the perception of neighborhood safety, parking, and pre- and post-theatre dining options.
- Furthermore, new management will need to rebuild relationships within the community, and actively pursue programming that is the appropriate fit for the Strand.
 - To attract strong programming and partners, attention to economic development and renovation is needed.
 - Benchmarking and competitive landscape research revealed that programming to this seating capacity requires management that will actively pursue an array of events that are a good size, location, and economic fit with the venue.
 - The development of a few key relationships with presenters and anchor arts and cultural groups to provide base of ongoing programming may be an effective strategy.



Executive Summary

Key Findings and Implications

- At present, there are a number of significant theatre projects underway that could further impact demand for the Strand Theatre.
- The opportunity to rebuild programming at the Strand is in the near-term.
 - As the Opera House reopens, and potentially the Constellation Center comes online in the next few years, this may create additional competition for the Strand in this size range.
 - The Strand enjoys “good will” among Boston’s arts groups, and should capitalize on this in the near-term.



Benchmark Theatres



Benchmark Theatres

Agenda

- Methodology and participation
- Mission
- Restoration and renovation
- Programming
- Community involvement
- Surrounding area
- Relationships
- Board and staff composition
- Financials
- Best practices
- Implications for Strand Theatre

Methodology

- Two uniform protocols, one full-length, the other a short version, developed by TDC in concert with the Task Force, was used to guide each interview.
- For each theatre, a representative of TDC conducted a 45- or 20-minute telephone interview with the theatre's Executive Director.
- The results were used to generate this segment of the presentation.
- Potential benchmark theatres were suggested by the League of Historic American Theaters and members of the Task Force.



Benchmark Theatres Participation

■ Non-profit Theatres

- Columbia Theater of Hammond, LA
- Edward C. Smith Civic Center of Lexington, NC
- Merrimack Repertory Theater of Lowell, MA
- Paramount Center for the Arts of Bristol, TN
- Apollo Theatre of New York, NY

■ For-profit Theatres:

- Forrest Theatre of Philadelphia, PA

■ Six out of twelve suggested theatres participated in the project.

Mission

- Key words from non-profit theatre missions include:
 - *“Improve the region’s quality of life...”*
 - *“Expose young people to theatre...”*
 - *“Enhance the educational, cultural and economic efforts of...its surrounding region...”*
- The one for-profit theatre interviewed exists to put on touring Broadway shows and has minimal involvement with the community.

Benchmark Theatres

Restoration and Renovation

Theatre	Restoration Date	Cost	Work Done
Apollo Theatre of New York, NY	On-going	\$54M	The restoration currently underway will give the Apollo a new roof and HVAC system. The marquee and "blade sign" will be replaced, and the administrative offices, gift shop, lobby, proscenium, dressing rooms and auditorium spaces will be refurbished and made ADA compliant.
Columbia Theater of Hammond, LA	2002	\$5M	The project involved gutting the original Columbia Theater and joining the two adjacent buildings to the remaining shell. The City of Hammond then constructed an 850-seat theatre with fly space, dressing and green rooms, large wings, a spring floor and heavy winches for performances requiring aerial work. Administrative offices and a conference center were also added.
Paramount Center for the Arts of Bristol, TN	1991	\$2.5M	The project involved enlarging the stage, adding a fly tower, creating three floors of dressing and green rooms for rehearsals and storage space.
Forrest Theatre of Philadelphia, PA	1997	\$200K	The project involved redecorating the Forrest's lobby and improving the seating in the auditorium by making it handicapped accessible.
Edward C. Smith Civic Center	1999	N/A	The project involved installing a state-of-the-art lighting system and a hydraulic orchestra pit.
Merrimack Repertory Theater	1986	N/A	Basic restoration of the theatre space.

Programming

- In terms of programming, the theatres in the benchmark fell into three distinct categories:
 1. Theatres that tailor their programming to their surrounding community.
 2. Theatres that offer programming that has intellectual or artistic merit as part of a larger mission to educate their audience.
 3. Theatres that offer one type of programming and are known for it.
- Theatres that tailor their programming to the surrounding community do so in such a way as to appeal to their region rather than simply the area immediately around the theatre.

Benchmark Theatres

Community Involvement

- In terms of community involvement, the theatres in the benchmark pool fell into three distinct categories:
 - Theatres that characterize community involvement in terms of youth programming and some measure of collaboration with local non-profit arts groups.
 - Theatres where community involvement comes primarily through rentals of theatre space by community entities such as local businesses or high schools having a graduation.
 - Theatres which have no significant community interaction.
- For most theatres interviewed, community involvement comes in the second form, offering rental space to groups within the local community.
- The model for the highest level of community involvement comes from the Apollo Theatre in New York, which offers:
 - The Apollo Academy where theatrical professionals lecture about their work in local schools.
 - A theatre tour program which brings students through the theatre as part of their history curriculum.
 - Shows first-run movies to local children for free in partnership with AOL/Time Warner.
- The Merrimack Repertory of Lowell, MA also has significant community involvement including:
 - Educational programming for children grades 1-12.
 - Low cost, off-season rentals to local arts non-profits.
 - Actively seeking to collaborate with local arts non-profits.
- The privately owned Forrest Theatre of Philadelphia has no community interaction

Surrounding Area

- Theatres that see their surrounding area as an asset listed an area with elements such as:
 - Multiple restaurants and upscale bars
 - Shopping opportunities
 - Ample, user-friendly parking
 - Public transportation access
- Theatres that see their surrounding area as a challenge listed an area with elements such as:
 - A sense of being outside the downtown area
 - Inadequate street-lighting and a perception of danger
 - A lack of safe walkways isolated from dense or high-speed automobile traffic

Relationships

- With the exception of the university-owned Columbia Theater, all the non-profit theatres in the benchmark reported working to maintain strong ties with the local arts community and the city government.
- All the non-profits believe that having a good relationship with the city and local arts groups is crucial to success.
- The Paramount Center of Bristol, TN, “tries to give them [local artists] what they want when they’re here.”
- The Merrimack Repertory Company actively supports and collaborates with local arts groups
- The Apollo devotes 40% of its stage time to community rentals.
- The Paramount, Merrimack and Apollo have good relationships with their host cities and are seen as an asset by local government.
- The only theatre operating without any involvement from the city or local arts community is the privately owned Forrest Theatre.



Benchmark Theatres

Board and Staff Composition

- Despite differences in size, theatres with boards of directors said that a board must be composed of members who:
 - Bring the skills and resources of a particular type that is need e.g. fundraising, marketing, legal expertise or technical expertise.
 - Are able to serve as ambassadors to the surrounding community.
 - Have at least a working knowledge of the artistic and technical sides of theatre.
- For non-profit theatres staffing patterns were similar:
 - Artistic directors and executive directors work closely together to develop programming.
 - Full-time administrative staff is as small as possible to ensure smooth operation.
 - Large volunteer groups, as high as three hundred in one case, are used to provide office support, ushering and extra manpower during large, special events.
- The Merrimack Repertory Theater offers a unique package to employees in which they are placed in theatre owned housing rented at below-market prices. This allows MRT to pay lower salaries and still attract highly qualified personnel.

Financials

- For the interviewed non-profit theatres, the years since 2001 have seen reduced audiences, decreased funding from corporations and private donors, and rising costs.
- Only the Paramount and Merrimack Repertory Theater released financial data, but even this limited data presented a challenged outlook.
- Those non-profit theatres that were willing to discuss their financial situation revealed themselves to be in areas with moderate to low potential where they were forced to compete with other equally worthy causes.

Benchmark Theatres

Best Practices

- For Boards of Directors:
 - Composed of individuals who address a particular given need of the theatre.
 - Composed of individuals who bring a specific expertise and potential connection to marketing, fundraising or legal services.
 - Composed of community members and people who understand and can serve as ambassadors to the community.
- For Executive Directors:
 - Skilled managers, capable of working with the board, staff and community.
 - A person who brings strong business, people and fundraising skills to the table.
 - Willing to do the “grunt work” of the theatre if need be.
 - A person who works well with and understands not just the local community but the surrounding area.
- For Staff:
 - As small as possible to facilitate smooth operation of the theatre.
 - Makes use of volunteers for high volume activities.
- For Theatres:
 - Have a mission which everyone in the organization understands and adheres to.
 - Find your programming niche and make yourself known for it, especially in a large city with many competing theatres.

Implications for the Strand Theatre

- As a non-profit theatre with a community mission, the Strand will need to fundraise for operations annually.
- The Strand will need a capable, visionary, and aggressive leader with strong business skills and a willingness to roll up their sleeves.
- The Strand will need a board which addresses the specific needs of the theatre and is capable of and willing to serve as community ambassadors. This includes fundraising support.
- The Strand will need the smallest paid staff possible and will have to use volunteer labor.
- The Strand should program in such a way as to bring in both neighborhood and regional audiences.



Competitive Landscape Research: Local Arts and Cultural Groups



Local Arts and Cultural Groups

Agenda

- Methodology and participation
- Rehearsal and performance spaces
 - Current and desired
- Audience
- Gaps in theatre landscape
- Strand Theatre
 - Appeal
 - Physical Plant
 - Programming
 - Neighborhood
 - Potential Customer
- Implications for Strand Theatre

Methodology

- A uniform protocol, developed by TDC, was used to guide each interview.
- For each site, a representative of TDC conducted a 15-minute telephone interview with the group's Executive Director.
- The results were used to generate this segment of the presentation.

Local Arts and Cultural Group Research

Participation

■ Theatre:

- ☐ ACT Roxbury
- ☐ Theater Offensive

■ Music:

- ☐ Boston City Singers
- ☐ Boston Gay Men's Chorus
- ☐ Boston Landmarks Orchestra
- ☐ Cantata Singers
- ☐ Equinox Music Festival
- ☐ Handel and Haydn Society
- ☐ Pro Arte Chamber Orchestra

■ Dance

- ☐ BalletRox
- ☐ Nicola Hawkins Dance Company
- ☐ Snappy Dance
- ☐ Uptown Dance Center

■ Other:

- ☐ Color of Film Collaborative
- ☐ Dorchester Historical Society
- ☐ Fleet Boston Celebrity Series
- ☐ Puppet Showplace

- Seventeen out of thirty-three suggested local arts groups actually participated in the project.

Local Arts and Cultural Group Research

Rehearsal Spaces

- Many local arts groups do not have sufficient rehearsal space; using churches or other ersatz spaces is a common practice.
 - *“Rehearsal space is wherever we can get it, we’re sort of gypsies in that respect.”*
- Most frequently mentioned theatre rehearsal locations:
 - Roxbury Community College
 - Boston Center for the Arts
 - Cambridge Multicultural Arts Center
 - Egleston Square YMCA
- Most frequently mentioned music rehearsal locations:
 - Parish of All Saints Church
 - Temple Sinai
 - The Porter Square Masonic Lodge
 - Emmanuel Church
- Most frequently mentioned dance rehearsal locations:
 - The Dance Complex in Cambridge
 - Jamaica Plain School of Dance
 - Green Street Dance Studios in Cambridge

Local Arts and Cultural Group Research

Performance Spaces

- While most local arts groups are able to find adequate performance space, a season often involves moving from theatre to theatre.
- Most frequently mentioned theatre performance locations:
 - Roxbury Community College
 - Boston Center for the Arts
 - Cambridge Multicultural Arts Center
 - Wheelock Family Theatre
- Most frequently mentioned music performance locations:
 - Jordan Hall
 - Sanders Theatre
 - The Jesuit Urban Center
 - Emmanuel Church
- Most frequently mentioned dance performance locations:
 - The Strand
 - The Cutler Majestic
 - The Copley Theatre
 - The Tsai Center for Performing Arts

Local Arts and Cultural Group Research

“Wish List” Performance Spaces

- Many local arts groups reported difficulty booking the theatre they wanted at a convenient time.
- Theatrical companies indicated that they generally had access to the performance spaces they wanted.
- Desired music locations:
 - The Opera House (2,500 seats)
 - The Orpheum (2,500 seats)
 - Jordan Hall (1,055 seats)
 - Kresge Auditorium at MIT (200 seats)
- Desired dance locations:
 - The Shubert (1,588 seats)
 - The Cutler Majestic (976 seats)
 - The Huntington (885 seats)



Local Arts and Cultural Group Research

Budget Numbers: 2003

(Groups Interviewed)

■ Theatre Budget Sizes:

- Lowest: \$250,000
- Average: \$275,000
- Highest: \$300,000

■ Music Budget Sizes:

- Lowest: \$58,000
- Average: \$901,106
- Highest: \$3,000,000

■ Dance Budget Sizes:

- Lowest: \$40,000
- Average: \$171,666
- Highest: \$250,000

Ideal Performance Space Characteristics

- All local arts groups wanted a theatre with ready access to public transportation, parking, pre- and post-show dining options and a perception of patron safety.
- All groups also wanted adequate dressing, green rooms and bathrooms available to their performers.
- Specific Requirements:
- Theatre Components:
 - Flexible seating arrangements
 - Adequate lighting and circuitry to support it
 - Adequate fly space
- Music Components:
 - Strong climate controls for classical instruments
 - Clean site lines
 - Adequate lighting
- Dance Components:
 - A sprung floor
 - Adequate wing space

Local Arts and Cultural Group Research

Total Audience Numbers: 2003

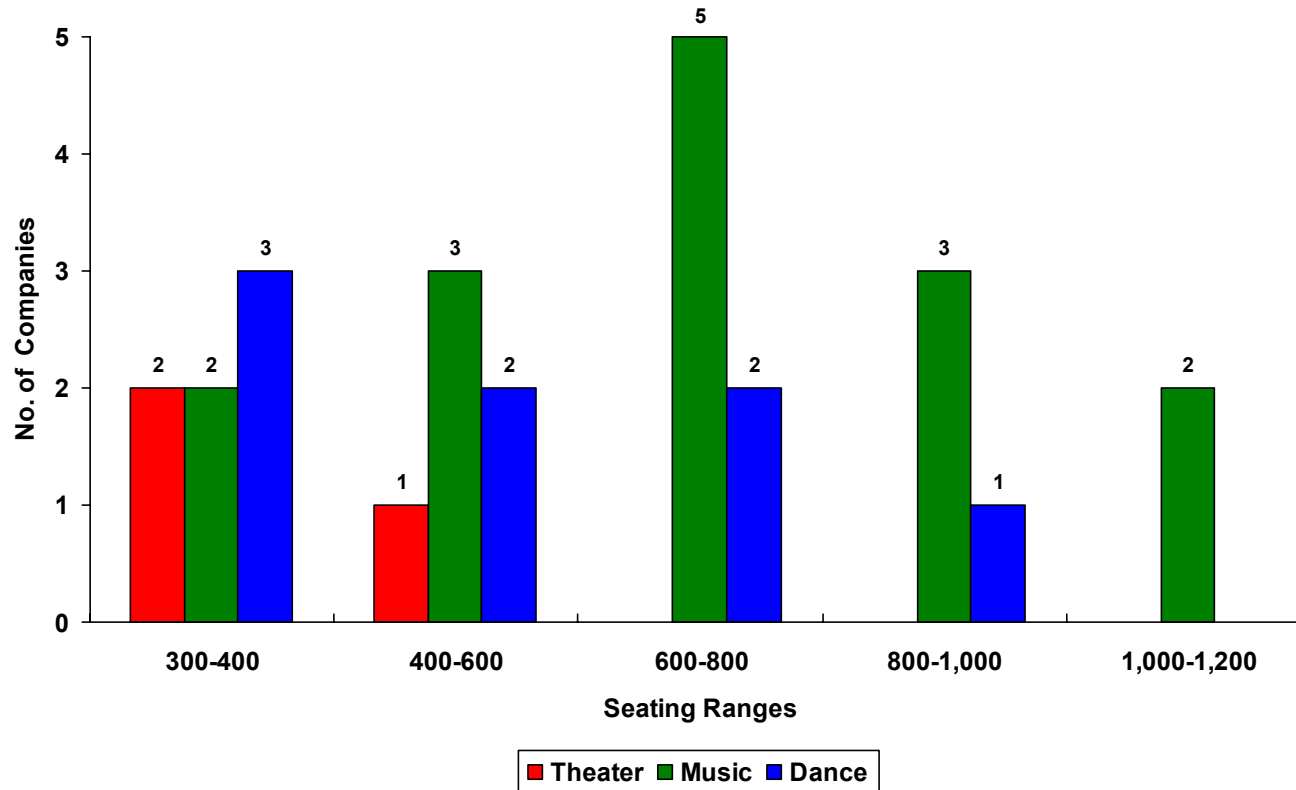
- When asked whether they sold out their performances “always,” “sometimes” or “never”, the vast majority of local groups said “sometimes.”
- Audience Numbers for 2003:
 - Theatre Audience Sizes: (2 groups)
 - Lowest: 1,000
 - Average: 5,000
 - Highest: 9,000
 - Music Audience Sizes: (8 groups)
 - Lowest: 5,000
 - Average: 16,214
 - Highest: 10,500
 - Dance Audience Sizes: (4 groups)
 - Lowest: 1,000
 - Average: 5,750
 - Highest: 12,000

Audience Characteristics

- Across the disciplines, the majority of many local arts groups interviewed are trying to appeal to an audience composed of people who are:
 - White
 - Affluent
 - In their thirties or older
 - College educated and sometimes with graduate degrees
 - Tied into the arts community through public and university radio
 - From the South End, Jamaica Plain, Cambridge, Newton and Metro-west
- Notable exceptions to this pattern are:
 - BalletRox which plays to a cross-section of society in age, class and race
 - The Puppet Showplace which attracts a wide spectrum of ages and also plays for school groups
 - The Boston Landmarks Orchestra which performs outdoors and brings classical music to families and people who might not go to Symphony Hall
 - The Theater Offensive, the audience of which is 75% GLBT

Local Arts and Cultural Group Research

Gaps in Theatre Landscape



Gaps in Theatre Landscape – Across Disciplines

- Of the groups interviewed, only music groups felt that spaces seating more than 1,000 were lacking in Boston.
- Out of the music groups surveyed, the majority felt that more spaces seating 600-800 were needed.
- Dance and theatre groups felt that smaller spaces were needed; seating 300-400 and 400-600.

The Strand Theatre: Feedback

- 44% of the interviewed groups were interested in using the Strand assuming that capital and management improvements were made, but would not consider the Strand as their primary venue.
- 33% of the interviewed groups that were strongly interested in the Strand generally cited similar reasons for their interest. Reasons for this were:
 - Bringing another theatre of the Strand's size up to the generally accepted standards of potential users would be beneficial for the entire arts community.
 - The Strand made a logical location from which they could appeal to a new audience.
 - The Strand is located in a community to which they already appeal.
- 22% of the interviewed groups felt that the Strand would not be a good match for them. Reasons for this were:
 - The Strand is simply too large.
 - Public transportation access at the Strand is too poor.
 - The organization's core audience would not make the move to Upham's Corner.

Improving the Strand – Physical Plant

- All of the arts groups in the survey were united in the view that the Strand's physical plant has been allowed to deteriorate and that improvements must be made. Some repeated suggestions were:
 - Completely cleaning and painting the entire theatre inside and out; the Strand was characterized as “dark,” “dingy,” or “dilapidated.”
 - Creating a functioning sound barrier between the lobby, concessions stand and the auditorium.
 - Replacing all seating which is characterized as “broken-down.”
 - Bringing the backstage area up to modern standards with well-lit dressing rooms with hot and cold running water, bathrooms and a green room for performers and staircases with a shallower pitch.
 - Improving the climate control system so that tuned classical instruments would not be disturbed by rapid temperature fluctuations.
 - Performing basic, routine maintenance such as clearing snow and ice from the stage doorway.
 - Replacing the grate on the front door with a see-through grille or a new grate without the mural.

Improving the Strand – Programming

- Groups surveyed voiced differing opinions on what could improve the Strand in terms of programming.
 - Some felt that the Strand had become an “African-American niche house” and that it offered nothing beyond programming for the African-American community.
 - Others felt that programming at the Strand had become too sparse, that the theatre was closed more than it was open, and that they were no longer sure of the theatre’s programming.
 - In a similar vein, several groups stated that the Strand no longer did any significant advertising and as such had less programming visibility and less audience.
 - It was generally acknowledged that a simple “face-lift” of the physical plant could “attract big names” to the Strand and make it a vibrant piece of the community again.
 - One informant suggested that the Strand could become a player on Boston’s theatre scene with programming which emphasized modern dance, hip-hop, or family offerings like circus shows or magic acts.
- Several benchmark groups noted that the management and box-office staff under the former management had been unresponsive to the point of driving away potential customers and artists.

Improving the Strand – Upham's Corner

- Benchmark groups were largely united on what would make the area around the Strand an asset to the theatre:
 - The theme of adequate transportation was sounded again and again. MBTA access to Upham's Corner is considered insufficient for large groups, and parking is perceived to be difficult and dangerous. One group suggested running shuttle busses from JFK Umass on the Red Line.
 - Many said that Dorchester still carried the reputation of ten years ago.
 - A significant number of groups suggested addressing the perception of safety issue with improved lighting and a highly visible police presence.
 - The issue of food and drink around the Strand was also considered to be a major stumbling block. Many arts groups felt that there were not enough appropriate pre- and post-show dining options to make the area around the Strand attractive, despite community perception to the contrary.
 - One arts group did raise the point that the dining options around the Strand were of the community and should stay that way, "it's not the South End, you shouldn't try to make it that way."

Implications for Strand Theatre

- The Strand enjoys “good will” among Boston’s arts groups, and should capitalize on this in the near-term.
- The Strand is universally considered to have been allowed to physically deteriorate and capital investment will be required to bring it to a standard where groups will want to be there.
- Local arts groups generally blamed the former management for the Strand’s conditions as they stand; new management will need to build a solid relationship with the arts community and take a leadership role.
- Some audiences perceive Upham’s Corner to be unsafe, difficult to reach by car or public transportation and unattractive for pre- or post-show dining.
- Several arts organizations are currently interested in using the Strand, assuming capital and management changes are made.



Competitive Landscape Research: Boston Theatres



Boston Theatres

Agenda

- Methodology and participants
- Theatre size
- Theatre type
- Model profile
 - For-profit theatres
 - Non-profit theatres
 - College/university affiliated theatres
- Gaps in the theatre landscape
- Implications for Strand Theatre

Boston Theatres

Methodology and Participants

- TDC conducted detailed interviews with theatres in order to understand the supply of existing and planned theatres in the Boston area.

Participants

- Scan included theatres above 500 seats.
- Of 24 theatres in the scan, 19 provided interviews*.
 - Information for other theatres was taken from web research and past TDC data.

**Includes the Strand Theatre, as well as the Tower Auditorium, which is just below 500 seats. Does not include the Paramount Theatre, the size of which is still being determined; it may be between 400 and 700 seats.*

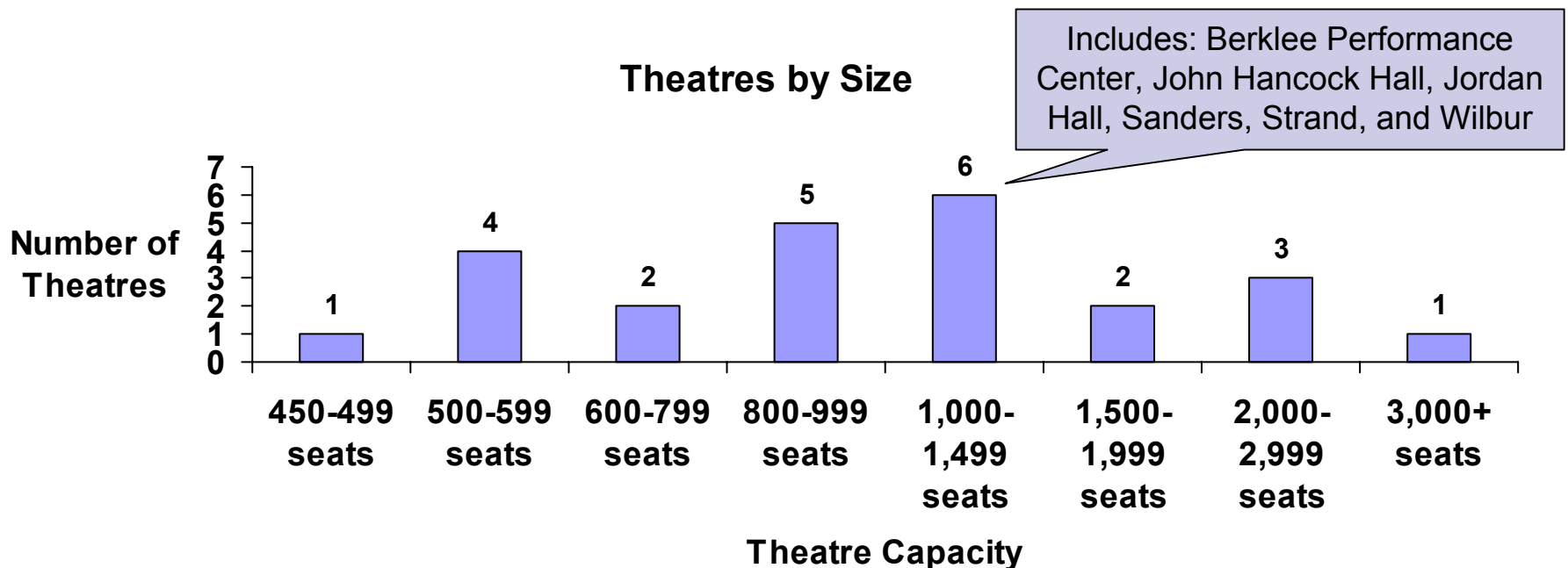
Methodology

- Interviews were conducted with theatre managers.
- Collected information on:
 - Physical appointments
 - Governance
 - Programming
 - Availability
- Many interviews included a visit to the theatre.

Boston Theatres

Theatre Size

- The largest groups of theatres are in the Strand's range of 1,000-1,499 seats and 800-999 seats.
 - In the 1,000-1,499 seat range, many theatres reported having some availability (i.e. room for additional rentals or shows).
- There is a relative gap in the 600-799 seat range.

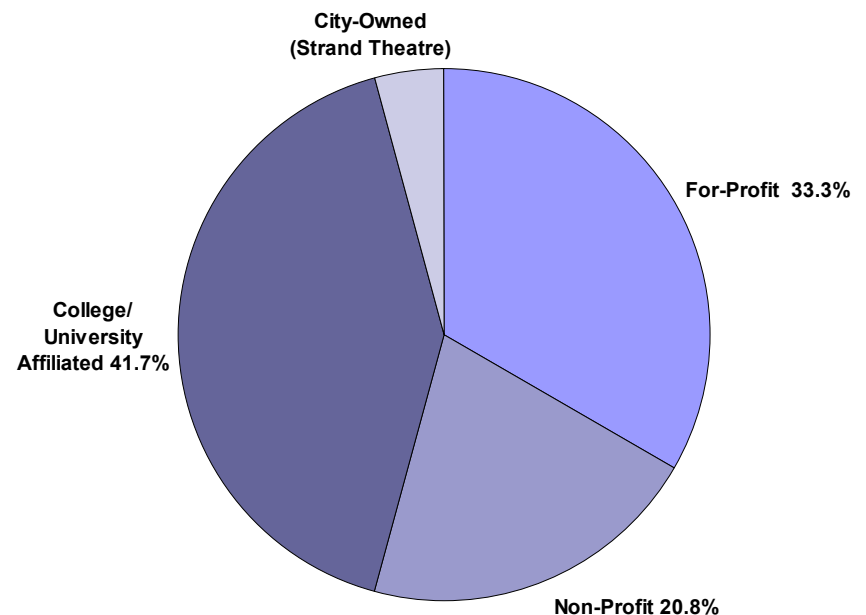


Boston Theatres

Theatre Type

- Theatres fall into three major categories:
 - For-profit
 - Non-profit
 - College/university affiliated
- The Strand Theatre is a unique model in Boston.
- For-profit theatres tend to be 1,000+ seats.
- College/university theatres span the sizes, with several such theatres in the 500-599, 800-999, and 1,000-1,499 seat ranges.

Theatres by Model



Boston Theatres: Model Profile

For-Profit Theatres

- For-profit theatres are almost all over 1,000 seats, and the theatre management actively seeks shows and events that will be a good size and economic fit with the venues.
 - Often program with either Broadway shows or concerts.
- Most for-profit theatres are either owned by or have strong relationships with presenters such as Clear Channel or World Music.
- Management pursues shows they think are an appropriate fit for the venue.
 - Also often have marketing departments that actively promote shows.
- Theatres are not often used by Boston area arts and cultural groups, and may be too expensive for most non-profit groups.
- Landscape of for-profit theatres may be changing in the next year in a way that impacts demand.
 - As the Opera House reopens in July 2004, there will be an increase in the supply of theatres over 1,000 seats.

For-Profit Theatres:

- Opera House
- Orpheum Theatre
- Colonial Theatre
- Wilbur Theatre
- John Hancock Hall
- Somerville Theatre
- Copley Theatre
- Charles Playhouse

Boston Theatres: Model Profile

Non-Profit Theatres

- Non-profit theatres have a few common characteristics, including size, mix of revenue sources, relationships, and schedule.
 - Non-profit category includes all large theatres (800+ seats).
 - Theatres rely on ticket sales and contributed income for support.
 - Tend to develop long-standing relationships with a few well-established local groups.
 - Theatres are tightly booked, and rentals may be scheduled at least one year in advance.
 - Similar to the for-profit theatres, non-profit theatres report that they pursue events or organizations that would be a good fit in the venue.

Non-Profit Theatres:

- Wang Theatre
- Symphony Hall
- Shubert Theatre
- Cyclorama
- Constellation Center (planned)

Boston Theatres: Model Profile

Non-Profit Theatres

- The programming and management for these theatres vary.
 - The Wang Theatre and the Shubert Theatre are part of the Wang Center for the Performing Arts.
 - At present, Wang Theatre often houses large Broadway shows.
 - Shubert Theatre tends to stage more non-profit groups than the Wang Theatre, and is home to several well-established groups.
 - Very little classical or popular music in either venue.
 - Symphony Hall, owned by the Boston Symphony Orchestra, is used by the BSO the majority of available concert dates.
 - BCA's Cyclorama theatre is part of a larger complex of facilities.
 - Theatre has diverse uses, and can be rented as a theatre, gallery, and exhibition hall.
 - Constellation Center, projected to open in the spring 2006, plans to program a mix of genres, including music performance, film, and opera
 - Center is designed to have state-of-the-art acoustics and equipment.

Boston Theatres: Model Profile

College/University Affiliated Theatres

- College/university theatres are associated with an educational institution, and prioritize affiliated events and performances in their schedule.
- The presence of so many affiliated theatres can make the Boston theatre landscape seem deceptively saturated.
 - College/university affiliated theatres tend to prioritize student performances and educational programming.
 - Several theatres rarely or never rent their spaces to outside cultural groups.
 - Difficult to become a new renter in this category.
 - Large theatres adopt rental strategy similar to that of non-profit theatres by developing relationships/partnerships with a few non-profit arts and cultural groups.
 - Theatres in this category comprise the majority of theatres in 500-600 seat range.
 - Also leads to gap of *available* theatres spaces in this range.
- Theatres tend to receive a significant subsidy from the affiliated institution.
 - Receive support such as renovations, bill paying, staff, and maintenance.
 - Some, but not all, theatres have revenue goals.

College/University Affiliated Theatres:

- Berklee Performance Center
- Sanders Theatre
- Jordan Hall
- Cutler Majestic Theater
- Boston University Theatre
- Wheelock Family Theatre
- Robsham Theatre
- Loeb Drama Mainstage
- Tsai Performance Center
- Tower Auditorium

Boston Theatres

Gaps in the Theatre Landscape

- Competitive scan reveals a few key gaps in the theatre landscape.
 - There is a lack of *available* theatres in 500-800 seat range.
 - Theatres in this range are either college/university theatres or have limited availability.
 - Theatres equipped for dance, especially at lower capacity levels.
 - Rental packages that include sound and lighting equipment.
- However, there are two planned projects that may fill some of these gaps and impact demand for other venues such as the Strand.
 - Although an exact seating capacity has not yet been determined, the Paramount Theatre will likely end up in the 400-700 seat range.
 - The planned Constellation Center will offer a new and state-of-the-art venue for music performance, opera, and film.
 - Complex will also include other, smaller theatres that may be an attractive complement for larger groups.



Boston Theatres

Implications for the Strand Theatre

- Strand Theatre is in a difficult size range, competing with established theatres that have existing relationships with presenters and local groups.
 - Furthermore, as the Opera House reopens, and potentially the Constellation Center comes online in the next few years, this may create additional competition for the Strand in this size range.
- If the Strand Theatre remains in this capacity range, effective programming will require:
 - Active pursuit of shows or organizations that are a good size and economic fit with the Strand.
 - Development of few key relationships with presenters and anchor arts and cultural groups to provide base of ongoing programming.